

CEA ACTION PROPOSAL

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Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR's website does not indicate CalHR support for the proposal.

A. GENERAL INFORMATION

1. Date

10-01-2021

2. Department

Department of FISCal

3. Organizational Placement (Division/Branch/Office Name)

Business Operation and Solutions - Workforce Development Center

4. CEA Position Title

Division Chief, Workforce Development Center

5. Summary of proposed position description and how it relates to the program's mission or purpose.
(2-3 sentences)

Under the administrative direction of the Business Operation & Solutions Division (BOSD) Deputy Director, the CEA A, fulfills substantial leadership and policy responsibilities over the Workforce Development Center. The CEA A will develop policies and strategic planning efforts as it relates to training and communications on the budget development and administration, statewide cash management, statewide accounting, claim audit/disbursement, and procurement that is provided statewide to FI\$Cal end-users.

6. Reports to: (*Class Title/Level*)

CEA B, Deputy Director Business Operation and Solutions

7. Relationship with Department Director (*Select one*)

- ☒ Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- ☐ Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(Explain):

8. Organizational Level (*Select one*)

- ☐ 1st ☐ 2nd ☐ 3rd ☒ 4th ☐ 5th (mega departments only - 17,001+ allocated positions)

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B. SUMMARY OF REQUEST**9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.**

The Financial Information System for California (FI\$Cal) began as a business transformation project in 2005, and was formalized with a Memorandum of Understanding (MOU) signed in 2007 by the State Controller, the State Treasurer, and the Directors of the Departments of Finance and General Services. FI\$Cal is one of the largest and most dynamic information technology (IT) undertakings in the nation based on the number of users, its volume and breadth of transactions, and amount of capital that will flow through it once it is complete. FI\$Cal enables the state of California to combine accounting, budgeting, cash management, and procurement operations into a single financial management system. This eliminates the need for hundreds of independent legacy systems and state-entity-specific applications that support the state's internal financial management operations. FI\$Cal provides standardization, transparency, discipline, effectiveness, and efficiency for the state's business processes. FI\$Cal employs a robust change management program with extensive training and outreach activities to ensure the system's successful implementation.

The CEA A is responsible for the operation of the Workforce Development Center (WDC), which provides training and development, client support, and communications to over 150 departments and approximately 15,000 users. Additionally the CEA A oversees external affairs, which includes the Public Information Officer and legislative analysis. The implementation of the FI\$Cal system has changed the way the state does business; previously, departments and agencies used various systems and databases to process accounting, budgeting, and procurement functions. With the implementation of FI\$Cal, business processes and procedures have drastically changed as users must now utilize an Enterprise Resource Planning system to conduct their work.

The CEA A provides leadership, oversight, strategic planning, and guidance over the daily operations of the WDC. The WDC provides client support through the implementation of a robust training program in the FI\$Cal Learning Center (FLC), direct client response and communications, and change management services.

The CEA A will coordinate with the Deputy Director, BOSD and partner executives to develop, maintain, and improve the training program. The CEA A also develops policies and procedures to maintain and improve the FLC and daily client communications and prepares and delivers formal reports and presentations, including persuasive arguments and fact-based evidence to executive leadership that support the policy direction pertaining to the WDC, resulting in statewide impact.

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B. SUMMARY OF REQUEST (continued)

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- ☒ Program is directly related to department's primary mission and is critical to achieving the department's goals.
- ☐ Program is indirectly related to department's primary mission.
- ☐ Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: FI\$Cal was established to transform the budgeting, accounting, and procurement functions of all state departments. The WDC provides ongoing support and training to departments that are using the FI\$Cal system. The WDC supports the mission of FI\$Cal by keeping departments engaged in using the FI\$Cal system while introducing new functionality (as applicable) and providing continuous training curriculum for our end users as well as assisting departments with process documentation.

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B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

Previously, the department conducted a reorganization that aided in the transition from project delivery to a maintenance and operations focus. The reorganization created three Centers within the Business Operation and Solutions Division (BOSD): FI\$Cal Service Center (FSC), Enhancements Service Center (ESC), and the Workforce Development Center (WDC). The FSC and ESC are both led by approved CEA A positions. The WDC was led by an existing Information Technology Manager II position that deployed the software for the FI\$Cal Learning Center (FLC). This project was recently completed and the position has become vacant.

The WDC completed the implementation of the FLC and now must focus on establishing statewide training curricula for the users of the system. The CEA A will establish policies and procures for training users collaborating closely with control agency partners. Establishing the CEA A will better align the WDC with the FSC and ESC and provide executive leadership and strategic planning for further developing the FI\$Cal training program. The CEA A will provide leadership, oversight, strategic planning, and guidance for the WDC while ensuring an exceptional client relationship and learning experience for FI\$Cal users.

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C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

The CEA A will develop policies, procedures, and strategic planning efforts as it relates to training curriculum on the budget development and administration, statewide cash management, statewide accounting and claim audit/disbursement, and procurement that will be used statewide by FI\$Cal end-users. This position will also develop policies, procedures, and strategic planning efforts as it relates to change management, readiness support, and communications for on-boarding new departments into the FI\$Cal system.

The CEA A leads a team of staff responsible for the development, delivery, and maintenance of training curricula to existing and on-boarding future FI\$Cal Departments. The CEA A will implement methodologies to measure metrics related to the delivery and effectiveness of the training program as well as collaborate with partner control agencies to ensure statewide consistency in budget, accounting, procurement, and cash management curricula. This position will also make decisions and implement methodologies to measure metrics on statewide communications, change management, and on-boarding efforts.

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C. ROLE IN POLICY INFLUENCE (continued)**13. What is the CEA position's scope and nature of decision-making authority?**

The CEA A is a member of FI\$Cal's senior management team responsible for providing program and policy direction, carrying out FI\$Cal's mission and vision, and formulating and implementing department-wide policies related to the implementation and development of FI\$Cal system training program and on-boarding efforts. The work performed in the WDC will be of interest to control agencies, departmental directors, and top management in all agencies with whom the WDC interacts with in support of the FI\$Cal system.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

The CEA A is responsible for developing and implementing new policy, as well as interpreting and implementing existing policy. As business processes change within the FI\$Cal system and/or state, the CEA A will implement new policies (as appropriate), as well as modify existing policies to better align system training, onboarding, and communications. The CEA A will also provide feedback on interpreting, developing, and implementing policies from the Deputy Director, BOSD and the FI\$Cal executive management. In addition, the CEA A will also have full autonomy to create and implement policies and procedures within the WDC that may have statewide impacts.